

**DRAFT PROPOSAL FOR
INTERSERVICE TRAINING REVIEW ORGANIZATION
PROCEDURES MANUAL**

Chapter 4

ITRO DOCUMENTATION/ADMINISTRATIVE REQUIREMENTS

1. **Study/Review Implementation Meeting Report Format.** The lead facilitator and study/review group chairman will ensure a comprehensive report is completed at every meeting. The chairman and the designated representative of each participating Service will sign the report. Figure 4-1, outlines the minimum report requirements. The lead facilitator will submit the report original to the Secretariat within 5 workdays of completion of the meeting. Each Service representative will provide a copy directly to his/her respective ITRO office.

ITRO STUDY/REVIEW REPORT FORMAT

1. Purpose. Include Title & Course Numbers of each course studied. To determine if there is sufficient commonality between each participating Service (list the title of the training being studied; e.g., "Army and Marine Corps Combat Engineer Training) to warrant Detailed Analysis.
2. Background. (Paraphrase from the Charter, stating what training is being studied, who is participating, etc. It is not necessary to repeat everything on an attachment; simply refer to it.
3. Discussion. (Here detail what took place at the meeting and provide sufficient detail to support the recommendation that will appear at the end of the narrative. Again, do not repeat, just refer to the attachments.)
4. Service Issues/Concerns. This is the opportunity for a Service to articulate a Service unique position on recommendations or discussion items developed during the course of the study.
5. Recommendation. (Always start this with "The QLG/DAG recommends proceeding with, or not proceeding with, detailed analysis.")
6. Signature Page
7. Attachments: Will vary according to the documentation required for a specific meeting. Consists of but not limited to the following: List of attendees, Service briefs, appropriate ITRO Forms, Resource Analysis Committee Reports.

Figure 4-1, Report Format

2. **Quick Look Group (QLG) Documentation.** Following DEB/DMRTEC approval of a study, the QLG will meet to initiate the study process. The QLG will make one of two recommendations: (1) Transition to a Detailed Analysis Group (DAG). This is a "Go" scenario; (2) Recommend termination of the study. This is a "No Go" scenario.

a. Go Scenario. A "Go" recommendation will be considered to be approved by the DEB/DMRTEC unless the DAG has received contrary instructions from the Secretariat. The QLG will provide a report to the Secretariat stating that initial Quick Look analysis is complete and study is progressing to Detailed Analysis Group stage. The Secretariat will staff the report of Service coordination. The report will be in report format, signed by the QLG Chairman and Service representatives.

b. "No Go" Scenario. A "No Go" recommendation will require review and approval by the DEB. The report to the DEB will be signed by the QLG chairman and each Service representative and will consist of items 1a(1) through 1a(5) above. The narrative summary will detail the QLGs findings regarding commonality of training between the participating Services. Keep in mind that the determination of whether or not to proceed into a Detailed Analysis will be based on the degree of commonality of training between the participating Services. Such things as who will host or where the training will be conducted or how the consolidated curriculum will be designed, are not QLG concerns. The QLG findings will be followed by a detailed explanation of why the QLG does not recommend proceeding with detailed analysis. In the event there is not consensus, Service representatives are welcome to include separate Service remarks in the report.

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c. **QLG Reporting Requirements**

- (1) Cover Sheet similar to the cover of this manual, with the ITRO logo, study title, and the date(s) and location of the meeting.
- (2) Meeting minutes or narrative summary of meeting results with a specific recommendation to proceed with detailed analysis or to terminate the study (GO or NO GO). **Figure 4-1** is a suggested narrative format.
- (3) Documentation of initial request for study (memorandum, message, JCS tasking, etc.).
- (4) List of Attendees (Include name, grade, command, phone, fax, and email address)
- (5) ITRO Forms 1, 1A, and 2
- (6) Any briefing slides
- (7) Proposed DAG Meeting Schedule. A QLG may convert immediately to Phase I of the DAG, in which case, the QLG and DAG results will be documented in a single report. When combining the QLG and DAG, all documentation required for both meetings will be included in the report.

3. Detailed Analysis Group (DAG) Documentation

a. Status Reports/Meeting Minutes. . Phase I of the DAG may require one or more meetings. A report is required for each meeting. Summarize recent DAG activity. The Lead Facilitator will provide Service representatives with an electronic copy and the Secretariat with an electronic copy of report and the original signature sheet. Minutes will be in the basic *Purpose, Background, Discussion, and Recommendation* format, deleting or adding paragraphs as appropriate. One or more Service representative may prepare a statement expressing Service concerns/issues for inclusion in the Discussion section when consensus cannot be reached. Documentation will include:

- (1) Cover Page
- (2) Narrative Minutes
- (3) List of attendees
- (4) Any briefing slides
- (5) Visual illustration of the course structure (course model)
- (6) Notional POI
- (7) Additional documentation, as required

b. Resource Requirements Analysis (RRA) Report. The RRA report will be the basis for final decision to implement (consolidation, collocation, deconsolidation, or revision, as appropriate) or to terminate the study without further action. It will contain:

- (1) Cover page.
- (2) Narrative minutes. The Discussion section should contain enough information (detail) to support the Recommendation(s) made by the DAG...
- (3) List of attendees.
- (4) Proposed Implementation POA&M
- (5) Draft MOA and ISA (if required)
- (6) **Cost Analysis Report.**
- (7) **Facilities Analysis Report**
- (8) **Manpower Analysis Report**
- (9) Additional documentation, as required
- (10) Refinement Resource Requirements Analysis Report. If required, a refinement RRA will be conducted. The report contains the same information as the RRA Report, with updated appendices reflecting the current resources requirements data.

4. Implementation POA&M. See Figure 4-2 for the proper format of an implementation plan.

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POA&M FORMAT
<p><u>Title:</u> (List the name of the study.)</p> <p><u>Authority:</u> (List the appropriate Executive Order.)</p> <p><u>Background:</u> (Describe the option selected.)</p> <p><u>Description of the Implementation:</u> (Details of equipment and personnel moves, student data, facility modification/MILCON, course convening dates, assumptions, etc.)</p> <p><u>Implementation Milestones:</u> (Refer to the <i>Implementation Actions</i> listing in the preceding Chapter.)</p> <p><u>Annex A:</u> Major Taskings</p> <p><u>Annex B:</u> Points of Contact (In addition to DAG members, list new participants and their specific area of responsibility.)</p> <p><u>Signatures.</u> All DAG members should sign implementation POA&M.</p>

Figure 4-2, POA&M Format

5. Implementation Meeting Reports. See Figure 4-3 for the proper format of an implementation meeting report.

Table of Contents
List of Attendees/Participants
Executive Summary
Signature Page
Major Milestones Summary
Purpose and Objectives of the Meeting
Assumptions, Comments, Issues and Concerns
Results
Recommendation (include host installation and participating Service recommended action items)
Appendices/Annexes/Attachments

Figure 4-3, Implementation Meeting Report Format

a. **ITRO Report Format and Internal Staffing Procedures** All reports and worksheet attachments will be generated using Microsoft Office software for standardization and to facilitate the staffing process via email. The final cost analysis report, Chapter 9, will be distributed in Adobe format.

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b. The facilitator will construct the report by creating each component of the report (i.e., cover page, minutes, briefs, costing worksheets) as a separate file either on disk or laptop. The following file names are suggested for each component of the report to ensure proper order when the report is printed and constructed:

- (1) Cover Page – 01(Study name) Cover.doc
- (2) Minutes – 02(Study name) Minutes.doc
- (3) Briefs – 03. (Study name) briefArmy.doc, 04.Navy.doc
- (4) Worksheets – 05Cost.doc, 06Facilities.doc, 07Manpower.doc

c. At the conclusion of a meeting, the facilitator will provide a copy of a report to the attendees via hard copy, floppy disk or email.

d. For all reports except the RRA report, the facilitator will submit the signed, original report to the Secretariat within five working days after completion of the meeting.

e. For the RRA report, the facilitator will hold the *draft* report until the resource committees complete the validation/verification process (15 working days). The appropriate resource committee chairman will advise the facilitator if changes to the RRA data impact the DAG recommendations. The facilitator will contact the DAG Chairman to determine if additional discussion, meeting or RRA are required. The facilitator will update the draft report as necessary to produce a final report ready for staffing.

f. The facilitator will prepare a draft ITRO Staff Action Form (SAF), to exclude the Secretariat tracking number and the suspense date and submit to the Secretariat with the report. The SAF should include a specific request for action by the SC/DEB/EB/DMRTEC and a general description of the action required.

g. The Secretariat will assign a tracking number and a 30-day suspense, and distribute for Service staffing.

h. If one or more Service does not concur with or approve the requested action, the Secretariat will advise the facilitator who will coordinate with the DAG Chairman to determine corrective action for resolution.

i. DEB/DMRTEC and EB decisions will be returned to the Secretariat upon completion of Service staffing. The Secretariat will report results to the DEB and publish appropriate IEO for approved actions.

6. ITRO Record Keeping. During a Service's tenure as Secretariat, it will be responsible for maintaining official ITRO records. These permanent records remain with that Service even after Secretariat has passed to the next Service. Records include, but are not limited to: Original QLG and DAG reports; original EB, DEB, Steering Committee, and permanent committee meeting minutes; ITRO Staff Action Processing Forms generated during the calendar year, associated with the foregoing, and the annual report for that calendar year. HC ITO will maintain permanent records for Health Care.

7. ITRO Annual Report. No later than 1 April of each year the former Secretariat Service will publish an annual report of ITRO activity for the preceding calendar year. Organization of the Report will be in the format found in Figure 4-4 and include, as attachments, a list of all studies initiated, continued, or completed during the year. The report will be provided to each ITRO office in sufficient quantity to allow for internal Service distribution. If requested, the report may be provided to other government and DOD agencies and activities in accordance with the Secretariat's Service policies and procedures. Annual reports will be signed by the previous DEB Chairman (for the year covered by the report).

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ITRO ANNUAL REPORT	
Cover Page:	ITRO Heading, the words "Annual Report," the calendar year covered by the report, and the title of the command preparing the report.
Abstract:	Summarize the Year's activities for ITRO.
Studies:	List each study, continued or initiated by ITRO, followed by status or results.
Other Actions:	As appropriate.
Attachments:	Current ITRO Organization Chart ITRO Executive Orders Committee Reports

Figure 4-4, ITRO Annual Report

8. **ITRO Executive Orders.** The Secretariat will document key ITRO decisions in an Interservice Executive Order, to include decisions related to approval to consolidate, collocate, deconsolidate or withdraw, policy, procedures, and resources. Or reference to the minutes from an EB, DEB, or DMRTEC meeting where the decision was made.

9. **Meeting Minutes** (other than QLG or DAG meetings). At a minimum, minutes will be for all meetings of the EB, DEB, SC, and each permanent or standing committee. They will be prepared on plain paper with a header of INTERSERVICE TRAINING REVIEW ORGANIZATION followed below by the name of the group meeting (Executive Board, Deputy Executive Board, etc.), and ending below that with the place and date(s) of the meeting and the Executive Order number as described in paragraph 8 above. The member's names and titles will follow (other attendees can also be either listed or attached). The remainder of the document can be organized chronologically, topically, or a combination of the two, as desired. The minutes need not be verbatim, but must accurately present all discussions. If possible, the minutes should include copies of slides or other material presented at the meeting. The meeting chairman need only sign meeting minutes. The Secretariat is responsible for preparing the minutes and will allow each Service to review and edit prior to signing. In this regard, members will be allowed to insert, delete or otherwise correct material in the minutes, **regardless of what transpired at the meeting**, but within reason and in a manner that does not turn the minutes into a useless document.

UNITED STATES MARINE CORPS MARINE CORPS COMBAT DEVELOPMENT COMMAND QUANTICO, VIRGINIA 22134-5017		IEO-XXXX-XX Date
MEMORANDUM FOR THE INTERERSERVICE TRAINING REVIEW ORGANIZATION		
Subj: ITRO EXECUTIVE ORDER XXXX-XX - IMPLEMENTATION OF SERVICE TRAINING REVIEW ORGANIZATION XXXXXXXX CONSOLIDATED TRAINING		
1. <u>Purpose.</u> 2. <u>Background.</u> 3. <u>Discussion.</u> 4. <u>Decision.</u>		
ATTACHMENTS: TRADOC Concurrence CNET Concurrence MCCDC Concurrence		I.M. INCHARGE BGen, U.S. Marine Corps Chairman Deputy Executive Board

Figure 4-5, Sample ITR